

DOCUMENT RESUME

ED 278 533

RC 016 092

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TITLE Advantages of Place in the "Sunbelt" as Perceived by Promoters.
PUB DATE Nov 85
NOTE 50p.; Paper presented at the Conference, "The Sunbelt: A Region and Regionalism in the Making?" (Miami, FL, November 3-6, 1985). Four appended pages of U.S. maps may not reproduce clearly.
PUB TYPE Reports - Research/Technical (143) -- Speeches/Conference Papers (150)
EDRS PRICE MF01/PC02 Plus Postage.
DESCRIPTORS *Advertising; Educational Quality; Environmental Influences; Financial Services; *Geographic Location; Geographic Regions; *Industrialization; Industry; Labor Force; Questionnaires; Regional Attitudes; *Regional Characteristics; Rural Areas; Site Selection; Socioeconomic Influences
IDENTIFIERS *Boosterism (Geographic); Chambers of Commerce; United States (South); United States (Southwest); *United States (Sunbelt)

ABSTRACT

Promotion of the Sunbelt area of the South and Southwestern United States was examined to determine perceptions of place and place qualities by institutions and individuals responsible for changing the geography of American industry over the past 60 years. Researchers sent questionnaires to 24 state and 80 city chambers of commerce throughout the South, Southwest, and border states. Results suggested a substantial difference between Southeast and Southwest in how Sunbelt boundaries and membership are perceived and indicated that the Sunbelt is not a region in the geographic sense. Ratings given 33 locational factors varied widely among different sections of the Sunbelt. The factors included quality of education; climate; recreational opportunities; low labor costs; favorable labor-management relations; skilled labor pool; dynamics of population growth; low cost of electricity, living, and land/building; favorable tax structure, community services, and pollution control laws; access to markets, resources, transportation, and metropolitan areas; and quality of natural environment. Respondents rated favorable labor-management relations the single most important factor. Other factors rated most important were access to markets and highways, quality of education, and labor conditions. Rated least important were environmental, aesthetics-climate, natural beauty, and recreation. Tables provide ratings of locational factors and respondents' maps of the Sunbelt. (LFL)

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Advantages of Place in the "Sunbelt"
as Perceived by Promoters

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Conference Paper presented at
"The Sunbelt: A Region and
Regionalism in the Making?"

November 3-6, 1985
Knight Convention Center
Hyatt Regency Miami
Miami, Florida

Meeting funded by grants from the
National Endowment for the Humanities
and the National Science Foundation



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Introduction

Where is the Sunbelt? If it is a region, what are its distinguishing characteristics? What are the factors that would attract migrants and investments into this region from elsewhere? These questions are implicitly the basis for this symposium. As professional observers of the American scene, we are called upon to provide knowledgeable commentary and answers. My premise is based not on an objective analysis that will yield yet another outsider's opinion about the location or viability of the Sunbelt as a geographical place but rather will be concerned with its subjective qualities. The Sunbelt is more image than reality. Certainly one can identify large segments of the South and Southwest where the climate is mild, the air is clean, and the sunshine is copious. Researchers beginning with Edward Ullman in 1954, have pointed out the attraction that such amenities have for migrants (Ullman, 1954). But there is great internal diversity in the South and Southwest, whether one considers physical geography, cultural heritage, or potential for economic development, and it is this diversity that prevents one from effectively generalizing about conditions and opportunity from one place to another.

The key characters to consult concerning the qualities of the Sunbelt are the people most directly involved in efforts to develop their portion of the region--the promoters, or boosters. It is the booster, often in the person of the chamber of commerce executive or a trade and development committee, who must anticipate the needs of prospective business and industry clients. The booster's home environment has a given range of conditions that may or may not be recognized as attractions to potential migrants. In the competition between America's regions for industry and political power, promotion is

assuming a growing importance. Almost twenty years ago, Robin Nelson reported that there were some 20,000 booster groups and agencies organized to compete for business with promotional expenditures in excess of 35 million dollars annually (Nelson 1967). In the interim, business recruiting has become very sophisticated and expensive as high-priced ad agencies vie with one another to present the advantages of southern states and cities to northern business by way of a variety of media (Foran 1979).

Boosterism by institutions and individuals (Foran 1979) is not new. It was practiced widely in this country and Canada from the earliest days of settlement in the East, through the completion of the transcontinental railroads in the West (Artibise 1981). Paul Voisey defines boosterism as the campaign to stimulate economic and population growth by advertising, lobbying, and offering incentives to development (Voisey 1981). Historically, boosterism has been a direct reflection of the attitudes and aspirations of local people, and although the literature on the role of boosters in regional development is growing, relatively little research has been done to date on the boosters behind the Sunbelt phenomenon. The major characters in the Sunbelt boom have been largely ignored. The booster, or promoter is in the forefront of enticing business into their cities and states. They are, perhaps, the single most important group responsible for the changing geography of American industry over the past sixty years (Wiley and Gottlieb 1982). Yet we know relatively little about promoters and what ideas or principles govern their efforts. Do they recognize a place that we are calling the Sunbelt? Do they attribute to the Sunbelt all of the qualities (i.e. competitive advantages) that have been assigned to it by the mass media? Or do they operate less in the realm of image and more in substantive

qualities of place--cheap labor, accessible building sites, low tax rates, and access to interstate highways.

To be a successful promoter, in the context of the South, would seem to imply that one has at least come to grips with a seemingly insolvable problem. How does one promote a place that academic observers say does not exist? Do they promote the image, knowing that some of the elements of that image do not apply to their area? They must realize that Northern businessmen who read ads placed in papers and magazines may be greatly influenced by the image those ads project. It is this theme that this paper will seek to address. Where is the Sunbelt in the minds of its promoters? What are the characteristics that the Southern promoter thinks are most important in the minds of prospective migrant businessmen? Do these characteristics seem to be the same ones that the media and academic observers have found to be important in attracting new business and industry? We are concerned, then, with the perception of places and place qualities by their promoters. Increasing numbers of perceptual studies are pointing out that people act according to their images of place and what they perceive place to be like and not necessarily on objective assessment (Browning and Gesler 1979). The Sunbelt may have originated as a catchword label but it may have become a real place in the minds of community leaders who are responsible for fostering growth and development. We need to appreciate the subjective dimension for the account of Sunbelt development, if based only on socio-economic factors, would be at least superficial and incomplete, if not misleading (Meredith 1985).

In order to make some evaluation of how promoters perceive the Sunbelt, I designed a brief questionnaire which was sent to the executive directors of a sample of 104 state and city chambers of commerce throughout the South,

Southwest, and border states. Questionnaires went to each of 24 states and to 80 selected cities. Cities were chosen to represent a range of sizes and geographical areas within their respective states. The questionnaire form was three pages long. It included 33-scaled-response items which asked the respondent to rate the importance of various locational factors in attracting industry to their area; five open ended questions that requested information on which cities and states the respondents thought to be their most important competitors, and their position relative to the Sunbelt; and an outline map of the United States. The respondents were directed to draw a line around that area of the country that they thought to be the Sunbelt (Raitz and Ulack 1981). Of the 81 respondents who returned the questionnaire, 77 completed the map question. Four left the map blank.

Cognitive Maps

To judge whether or not there were differences in how the respondents viewed the location of the Sunbelt and how they assigned membership in the Sunbelt, I tabulated the number of times a state was depicted as being entirely within the Sunbelt to compile an aggregate cognitive map for all of the respondents. I then compared the cognitive maps of two types of respondent groups. The first comparison was made by dividing respondents into two general groups: those who said their city or state was outside of the Sunbelt as compared to those who said they were inside. It was not my prerogative to compare the respondent's maps against some objective delimitation of the Sunbelt that I or others might create. Rather it is the perceptual maps that we wish to compare because these maps may suggest a rationale for certain action and behavior. If respondents see themselves as being in the core of the Sunbelt, then this may suggest that they may also

possess certain attitudes or values about their home area that would be shared by other Sunbelt members. It may suggest for example, that they perceive their neighboring Sunbelt states to be more formidable competitors for new business and industry than a state that lies to the north. To do otherwise would represent a kind of cognitive dissonance.

We can begin by reviewing the map that represents the consensus of those respondents (N=50) who reported that their state or city was within the Sunbelt (Map 1). According to this group, the core of the Sunbelt -- defined here as that area where 90 percent or more of the respondents agreed that a state lies within the Sunbelt - is discontinuous. The core extends from South Carolina to Florida and West to Alabama. Mississippi misses the cut off as does Texas. But Louisiana is included by 98 percent of the respondents. Florida is the only state that all respondents placed in the Sunbelt. Arkansas, Texas, and Mississippi represent a secondary level of membership -- 80 to 89 percent agreeing that they are within the Sunbelt. A third, or tertiary level of membership -- 70 to 79 percent agreement would include North Carolina and Tennessee in the east and Oklahoma, New Mexico, and Arizona in the west. California is only weakly associated with the Sunbelt -- 28 percent placing the entire state within the area. If we include the additional 26 percent who placed at least one-half of the state within the Sunbelt the total is still a modest 54 percent agreement. This group of respondents rated the border states from Virginia to Nevada to be just that, only Kentucky and Virginia were favored with Sunbelt designations by at least a quarter of the respondents.

How does this map compare with the composite map of the Sunbelt as perceived by the respondents who reported that they were not a part of the

Sunbelt? This group is smaller (N=27), and seems less clear about where the Sunbelt's boundaries might be and who its members are. Respondents in this group are largely from the border states; Delaware and Maryland west through Missouri to Nevada and Northern California (Map 2). From their collective viewpoint the Sunbelt has no clear core area. The intensity of agreement is substantially lower for this group. They do identify a secondary area that includes Louisiana, Alabama, Georgia, South Carolina west to Arizona. The border state respondents failed to place themselves into the Sunbelt at the same rate as the self-proclaimed Sunbelters did, and California failed to attract the support of as many as a quarter of the respondents.

What can we learn from this pair of cognitive maps? First, the Southern states seem to be more liberal in their assessment of which states are included within the Sunbelt and which are not. The border states seem to be willing to exclude themselves. Second, the Southern states may have included the border states in the Sunbelt, in part because they view the border states as possessing Sunbelt-qualities. This would infer that they would also view these states as potential competitors for northern business and industry. Conversely, the border states seem ambivalent about being part of the Sunbelt and apparently they do not see themselves as possessing Sunbelt qualities. This could be viewed either positively or negatively and further research would be required to evaluate whether or not the border states view the Sunbelt states positively or not. Historically they have not. This may be reflected in the somewhat lower rating given to Mississippi relative to the other Southern states.

Regional Comparison of Cognitive Maps

To further expand our understanding of these cognitive maps of the

Sunbelt, I grouped respondents into four regions to compare them spatially. A characteristic of many cognitive maps, regardless of their scale, is that they are affected by the principle of proximity. The principle recognizes that individuals are more familiar with places that are proximate to them and consequently, this familiarity will tend to distort a cognitive map so that nearby places are exaggerated while distant places go unrecognized or are distorted in size or extent (Raitz and Ulack 1981). This phenomena may be carried somewhat further if the area portrayed has highly favorable attributes. One may be tempted to place one's self within that favorable area rather than admit you are beyond the pale.

In an initial comparison of the cognitive maps produced by the four regional subgroups the principle of proximity operates to affect the results in two ways. First, the core of the Sunbelt increases in size and intensity or shifts direction relative to the perspective of the respondents. Second, with the exception of one regional group, the Southwestern States, there is a tendency of the respondents to shift the boundary of the Sunbelt toward themselves.

We may begin with the composite cognitive map of the respondents from the border states (Map 3), roughly the same group that we noted previously had dealt themselves out of the Sunbelt. Their map shows a relatively weak core of discontinuous states -- Louisiana, Alabama, Georgia, and Florida. Secondary Sunbelt members include Texas, Oklahoma, Mississippi, and South Carolina at 80 to 89 percent agreement, and a tertiary group, Arizona, New Mexico, Tennessee, Arkansas, and North Carolina. California, Kentucky, and Virginia failed to be selected by as many as a third of the respondents.

Comparing this map to that of the respondents from the Southeastern

states reveals an interesting shift. (Map 4) The core of the Sunbelt is now much larger, more intense, and is focused on the Gulf and South Atlantic coasts. All of the Southeastern respondents agreed that Florida was part of the Sunbelt, and states with 90 percent agreement or more extend in a contiguous block from Louisiana and Arkansas to North Carolina. Texas and Arizona are secondary members of the Southeast's Sunbelt while New Mexico and Oklahoma fall to tertiary membership. Kentucky and Virginia fail to gain even the tertiary level but they do receive the highest ratings given by any of the regional groups, including their own group, the border states.

The composite cognitive map of respondents from the South central states (Texas, Oklahoma, Arkansas, and Louisiana) reveals a shift in the intensity and shape of the Sunbelt core. (Map 5) Georgia, Alabama, and Louisiana are now thought to be within the Sunbelt by 100 percent of the respondents. Florida falls from 100 to 93 percent approval. Tennessee, North Carolina and Arkansas now fall to the secondary level while New Mexico and Oklahoma rise to the secondary level, as compared to the border states map. California and Nevada, oddly, receive their highest values from the South central state respondents at 40 and 20 percent, respectively.

The anomaly in this map sequence is the one produced by the Southwest respondents from California, Arizona, and New Mexico. (Map 6) There are two caveats in interpreting this map. First, and this applies to California on each map, I chose to allow this state to stand as selected only if the entire state was selected. I did tabulate responses for parts of states (more than half and less than half were tabulated, for example), but the additional detail added by including portions of states did not seem to add to or clarify the interpretation. Second, the number of respondents from the Southwest is

relatively small, only eleven. These problems acknowledged, the Sunbelt as seen from the Southwest is of considerable interest because it seems to suggest that the Southwesterners do not see themselves as enthusiastic members of the Sunbelt. Arizona and New Mexico fail to merit the tertiary level with only a 64 percent level of support and California records 36 percent. The core of the Sunbelt diminishes to two widely separated states, Louisiana and Florida. Texas, Georgia, and South Carolina are secondary members, and Oklahoma and Arkansas join Arizona and New Mexico at the tertiary level. Tennessee and North Carolina are token members with just over 25 percent of respondents in agreement. None of the eastern border states were perceived by the Southwestern respondents to be in the Sunbelt although the western border states were rated somewhat higher.

What might these patterns suggest about the Sunbelt? There seems to be a substantial difference between the Southeast and Southwest in how they perceive the boundaries and membership of the Sunbelt. Respondents from the Southeast and South central states appear to identify more strongly with the idea of a Sunbelt than do the Southwestern states. Perception research points out that cognitive maps represent the geographical images that people have of their surroundings, however far they extend. Such maps are not expected to be correct in any empirical sense, yet they are important because people usually think and act spatially in terms of these perceptual maps. We might therefore interpret these maps to suggest that the respondents from the South central and Southeastern states see certain of their neighboring states and cities as sharing those characteristics that qualify them as members of the Sunbelt. It would follow then that they would also see these same places as their primary competitors for new business and industry. Despite some rather dramatic

differences in human and natural resources from one state in this group to another, one might expect to find some commonality in their assessment of the factors they believe are conducive to attracting new businesses. The respondents from the Southwestern states seem reticent to include themselves in the Sunbelt and we might anticipate that their opinions of which factors are most attractive to potential business migrants will be different as well.

In their 1979 report on the Sun Belt-Snow Belt dichotomy, Clyde Browning and Wil Gesler found that a statistical analysis utilizing regional grouping techniques would not yield a distinct Sun Belt region (Browning and Gesler 1979). Rather, they concluded, there seems to be two regions - The Sun Belt East and the Sun Belt West. They found that differences in such measures as sunshine, population change, federal involvement, and economic well-being were greater between east and west, then they were between Sun Belt and Snow Belt. Their Sun Belt West was essentially the same area that is standing alone on the perceptual map, California, Nevada, Arizona, and New Mexico.

Promoters' Attitudes toward Locational Factors

With a somewhat better understanding of whether or not Southern business promoters recognize a place called the Sunbelt, let us proceed to the second objective of this paper, an assessment of the importance that promoters assign to the characteristics of climate, transportation, labor, etc., that are credited with attracting northern business into the South. Some business writers believe that industrial growth in the South has resulted not because of the efforts of recruiters but because of economic fundamentals. Gurney Breckenfield, for example, contends that the success of the Sunbelt lies in its lower costs, a willing and productive labor force, raw materials - water in the Southeast, energy in Texas, Oklahoma, Louisiana, and Alabama, and the

opportunity to serve a developing market (Breckenfeld 1977). Bernard Weinstein and Robert Firestine, on the other hand, among others, believe that interstate and interregional migration is most closely related to climate (Weinstein and Firestine 1978). Migration to metropolitan areas appear to be closely related to various quality of life indicators such as air pollution. But they also contend that the dynamics of growth cannot be completely quantified or modeled. A businessman's decision to relocate may not be based on purely economic considerations -- if they were would we not assume they would all be successes -- but that the subjective elements may be as important as the objective ones in the decision-making process. Perceptions of the facts may be as important as the facts themselves. A recent paper by Rebecca Roberts and Lisa Butler supports the idea that amenities related to climate, recreational opportunities, and landscape are persistently credited as the major reasons for the South's growth (Roberts and Butler 1983).

But if these locational factors are to be found across large parts of the South, how do prospective business migrants narrow their choices? James Cobb believes that the final selection of a new site often depends on the persuasive abilities of competing chambers of commerce (Cobb 1982). If the promotional efforts of chamber members are so important in the business relocation process, it seems appropriate to examine their assessment of the factors that ostensibly attract business clients. The questionnaire directed to a sample of state and city chamber executives included 33 locational factors, cited in the academic and business literature as being important considerations in business migration. (Table 1). These factors were presented in randomly mixed order and respondents were asked how important they thought each was in attracting business and industry to their area. The

responses were rated on a five-point scale from unimportant to very important. The factors can be loosely organized into seven groups: Education, three factors; Environmental Aesthetics, five; Labor, four; Infrastructure, seven; Accessibility, seven; Financing, two; and Environmental Quality, five.

The respondents were initially divided into the same regional groups that were used to analyze the cognitive maps; border, Southeast, South central, and Southwest. I chose to compare groups according to the percentage of respondents that gave each factor the highest or very important rating (Table 1).¹

Education

The three education factors (Quality of Secondary Education, Quality of Higher Education, and Research Institutions) were rated highest by the South central states and lowest by the border states with a spread of 15 percentage points between the two groups. Higher education was deemed more important than secondary by the South central group. The Southeast also rated education down, and placed secondary education 17 points above higher education. The Southwest and South central groups gave research institutions their highest ratings -- but only 25 percent believed that such institutions were very important. Only 6 percent of the border state respondents thought that research institutions were important. One explanation for the low ratings given to research institutions might be that such places are not ubiquitous and a city without a university or other research center could not respond positively to this item. Further, the border states may have little to compare with North Carolina's Research Triangle, or the research groups centered in Austin, Texas or California's Silicon Valley.

Environmental Aesthetics

As a group, these five factors were rated least important of the seven factor groups. The border and South central states rated these factors lowest with the Southeast only three points higher at 17 percent. One might expect such low ratings from the border states, but not the Southeast and South central groups. The Sunbelt literature suggests that climate, amenable winter weather, recreational opportunities, etc., are the most important factors influencing migration of people and business into the South and West (Roberts and Butler 1983). Ostensibly, these factors represent the rationale for coining the term Sunbelt! Yet only in the Southwest do more than one-fourth (28 percent) of the respondents rate these factors as important to business and industry. One might expect the border states to defer on this factor, but not the Southeast and South central respondents. If we single out the warm winter weather factor, we see that only 11 percent of the total respondent group rated it as very important. With the exception of dynamic population growth, in the labor factor group, this factor received the lowest rating of any single factor considered. Recreational opportunity, on the other hand, was rated as the most important factor in this group, most notably by the Southwest respondents (50 percent).

In addition to asking the respondents to fill out a questionnaire, I also requested that they send me a packet of the promotional materials that they send to prospective business and industry migrants. Thirty-seven cities and states sent promotional materials. A cursory review of this material suggests that virtually all of the respondents make some mention of their climate, the attractiveness of their area, and opportunities for recreation and outdoor living. Many included tables with figures on temperature, precipitation, and hours of sunshine. Two kinds of inconsistencies seem apparent here. First,

the chamber of commerce respondents do not seem to believe that environmental aesthetics are as important in attracting business as the literature suggests. Second, despite the chamber executives' responses, the promotional materials they send to prospective clients still tout the positive aspects of their climate.

Labor

The labor factors were rated fairly high in the border states and the Southeast but were thought somewhat less important in the South central and Southwest states. Favorable labor-management relations was the most highly rated individual factor in this group when considered by the entire respondent sample. It was ranked as the most important of all 33 factors considered. Among the regional groups, labor-management relations was rated highest by the Southeastern states (85 percent rated it as very important). The Southwest's rating was lowest. The Southeast has traditionally resisted unionization. Promotional literature from the Southeast usually presents an image of workers who possess a work ethic, cause limited work stoppages, and are prepared through vocational training programs. Access to a skilled labor pool was rated highest in the border and Southeast states and some 20 percentage points lower by the South central and Southwest respondents. The rationale for this kind of response is not particularly clear. Certainly the Southwest states are reputed to have a highly skilled labor force. The low cost of labor factor was rated as least important by the Southeast respondents where labor has traditionally been non-union and paid less than in other areas. The logic of such a response is not immediately clear. In the Southwest, the labor pool is rather mixed. A substantial number of people are employed in high-skill, high-paying electronics, computer, aerospace, laser, and robotics industries.

Some unions are well represented, yet large numbers are employed in menial service and agricultural jobs. The relatively high rating given to low cost of labor (58 percent) may suggest that the respondents are evaluating the unskilled sector of the labor pool.

Dynamic population growth was considered with the labor factors because it could be viewed as a source of labor for large-scale employers. Growth could have also been viewed as an index of increasing market size. Nevertheless, this factor, which has been deemed to be quite significant in the Sunbelt development literature, was the lowest-rated factor of the entire group. Perhaps the respondents viewed population growth as potentially negative--associated with escalating real estate values, crowding, and increasing pressures on schools, utilities, and services. One Texas city's promotional literature stated that rapid growth was desirable only if it could be effectively controlled and would not alter the existing quality of life. They would not encourage large industries, employing several thousand people, to move in (Hackney 1981). Yet the literature provided by many other cities often made a point of providing detailed information on population change and many even graphed the rate of population growth for ease of interpretation. The promotional materials were replete with phrases extolling growth--growth of population, airline flights, housing starts, miles of expressway, jobs, and hospital beds. Some cities included forecasts of growth through the year 2000. This factor seems to represent the highest level of respondent cognitive dissonance of the 33 factors considered.

Infrastructure

Seven factors dealing generally with utilities, taxes, services, waste disposal, and cost of living were compared together under the heading of

infrastructure. Of the seven, favorable tax structure was deemed most important by all respondents. Tax structure was rated most important in the South central states and least important in the Southwest with a spread of 38 percentage points between them. Low cost of electricity was rated as most important by the border states (73 percent), perhaps because the coal-fired steam plants and hydroelectric dams in West Virginia, Virginia, and Kentucky provide comparatively inexpensive power. Cheap electricity was rated as very important by only a quarter of the respondents from the Southwest. Waste disposal regulation was the third ranking factor in this group. It was rated very important by 59 percent of the respondents from the Southwestern states but virtually 20 percentage points lower in the South central (31 percent) and border states. California has been a national leader in its concern for successfully managing industrial and residential wastes. Residents apparently believe that their regulatory system is acknowledged and favored by prospective business clients. Pollution control laws rated 12 percentage points lower than did waste disposal, and again the Southwestern states rated this item a good deal higher than did the other state groups. The lowest response was from the South central states (TX, OK, LA, AR), four states that have traditionally hosted heavy industry in petroleum refining and chemical manufacturing. These industries have been criticized for polluting air and water, especially along the lower Mississippi and Buffalo Bayou south of Houston. The low rating of this factor may reflect the permissive attitude that these states have traditionally had toward major environmental polluters. Low cost of land and buildings and community services were rated relatively low as factors with roughly one third of the respondents rating them as very important. Again, respondents in the Southwest states rated this factor

substantially higher than did the Southwestern group.

One of the most interesting anomalies in this factor group is the low overall rating given low cost-of-living (21 percent). Most of the promotional literature stresses this factor as a major attraction in virtually every part of the South and West. It is especially interesting that the Southwest respondents rated this factor the highest (33 percent) of the regional subgroups. Traditionally the Southeastern states have enjoyed the reputation of having a low cost-of-living whereas California and Arizona are known as relatively expensive places to live. Promotional literature from California cities usually points out that the local cost-of-living (apartment rental rates, for example) is relatively modest. One city's promotional brochure contained a lengthy listing of residential real estate transactions by residential zones that included the average and median price of housing sold in 1985. Average prices ranged from a low of \$103 thousand to a high of \$244 thousand. Another table listed a cost-of-living consumer price index for a six-year period set to a base of 1967 prices. It is admirable that a city or state should wish that perspective residents know the cost-of-living as compared to where they are. There may be an altruistic rationale for including such information. But how can one rationalize the fact that this information actually points out that the costs-of-living is actually quite high, relative to, say, a medium-sized city in Georgia or Alabama. On the other hand, respondents from the South central states rated low cost-of-living factor quite low (12 percent). Here the case would be easier to make -- the cost-of-living is indeed lower than in many parts of the region. Houston, Texas has a cost-of-living that is below that of the national urban average and below that of other large cities such as New York, Chicago, and Los

Angeles. Yet the respondents from these four states and 12 cities apparently do not believe that this is a significant advantage in attracting new business.

Access

As a group, the accessibility factors were the most important of the seven factor groups considered. Access to market and interstate highways tied with quality of higher education as the second most important factor in attracting business (69 percent) (Liner 1981). Quality of roads and highways was rated third within this group (59 percent) and just less than one-half of the respondents agreed that access to resources was very important. Rail service access, as one might predict ranked relatively low. Among the highest rated factors, access to market had the greatest variability with a range of 35 percentage points between regional response groups. Eighty-five percent of the respondents from the Southeastern states rated this factor as very important. In the border states, three-fourths of the respondents gave this factor their highest rating. On the other hand, the South central and Southwest groups rated this factor much lower (47 and 50 percent respectively). Why such inconsistency in the evaluation of available markets is not entirely clear. One explanation may be that many of the existing industries, as well as industries that the South central and Southwestern cities hope to attract, are manufacturing commodities that are sold on a world market rather than being sold to local consumers. The so-called high technology industries that create electronics, computer hard and software, and robotics, are produced in substantial quantities in Santa Clara County, California; Maricopa County, Arizona; Travis and Dallas counties, Texas; and Bernalillo County, New Mexico. On the other hand, many industries in the

border and Southeast states manufacture commodities for direct entry into the consumer market: clothing, furniture, food products, and fabricated metal products (Storrs 1981).

If the respondents from the South central and Southwest states were not enthusiastic about the importance of access to markets, they were less so concerning access to resources. This response is difficult to understand because of the substantial deposits of petroleum, natural gas, radioactive minerals, coal, and other mineral, agricultural, and forest resources. The highest rating for this factor was given by the Southeastern respondents (60 percent), but one could argue that at least in the area of fossil fuels and many minerals, the Southeast has less to offer than the South central or Southwest states.

Of the three transportation factors (quality of roads and highways, quality of rail service, and access to interstate highways), access to interstate highways was rated as very important by 69 percent of the respondents. Ratings by regional groups on this factor were essentially uniform (the range was only 5 percent, from 70 to 75), except for the South central respondents who rated this factor some 14 percentage points lower than the next lowest state group, the Southeast. This relatively low rating is not reflective of freeway access across the South central states. The major cities of this region are well served by the interstate system which is supplemented by state expressways. The state highway system would seem to be at least adequate. Two factors may relate to the differentials in this rating. First, the South central states do enjoy a considerable variety of land transport and they lie astride major water routes. The Mississippi and Arkansas rivers serve Louisiana, Arkansas, and Oklahoma. The Intracoastal

Waterway serves Texas and Louisiana and the Buffalo Bayou-Houston Ship Channel serves Southeast Texas. Second, in the Southeast and border states, state highways, until relatively recently, have been narrow and low quality. These states had few large cities where industry would cluster. The interstate highway system allowed easy access to many remote areas and freeway interchanges began to spawn rapid development. Especially good examples of this phenomenon are I-40 in North Carolina and Tennessee; I-75 in Kentucky, Tennessee, and Georgia; I-81 in east Tennessee and Virginia, and I-85 on the Carolina piedmont.

Quality of roads and highways was rated highest by the Southwestern states but 39 percentage points lower by South central state respondents. The rationale for such a wide differential is not clear. In the promotional literature provided by city respondents there were usually major sections on the quality and quantity of their highway systems. Most included maps that illustrated connections to major U. S. cities, and tables or descriptions of highway mileage. Quality of rail service was not deemed important by any regional group, all rated it at less than 40 percent. The lowest rating, 10 percent, came from the Southeast states where rail system development has traditionally lagged behind the rest of the nation and the poor maintenance on some lines has led to numerous accidents and a sullied reputation.

Finance

The two financial factors (available financing through revenue or general bonds, and availability of venture capital) were rated relatively low. Only eight percent of the respondents in the Southwestern states rated venture capital as very important, although one-quarter of the South central and 22 percent of the border state groups agreed. Very few of the respondent's

promotional dossiers contained any mention of the availability of local capital for investment in new business. Higher ratings were given to the importance of financing through bonds. The border state group rated this factor highest of any regional group (41 percent). Perhaps the importance assigned to this factor is the result of incentives used by the border states to compete with states further south. Only a quarter of the respondents in the Southwest rated financing as very important to their recruiting of business and industry.

Environmental Quality

This is the only factor group in which there was a clear and consistent dominance of the highest ratings by one region, the Southwest. Overall, none of the five factors was rated extremely high, although over one-half of all respondents said that assured future fresh water availability was very important. In the Southwest state respondent group, 75 percent rated this factor as very important. This is undoubtedly the most water-conscious of the four state groups; indeed efforts within these states to manage water for agricultural and industrial development on intra and interstate levels has been underway for over a century. Potable water availability has an impact not only in industrial applications but also in potentially limiting population growth, and the people of the Southwest are painfully aware that this basic resource must be carefully managed if supply is to keep pace with projected growth without prohibitive cost.

One of the major ironies revealed in this study is the relatively low ratings given to basic environmental quality indicators by each state group. Clean air (22 percent), clean surface water (28 percent) and quality of the natural environment (28 percent) were not perceived to be very important in

attracting new business. The term "Sunbelt" is often juxtaposed with "Rustbelt" in media essays on industrial transfer to the South. Implicit in those regional cachets is an image of decaying manufacturing plants, polluted rivers, and foul-smelling air. The Sunbelt on the other hand evokes an image of clear skies and sweet breezes. Most study respondent's promotional literature hyped a "high quality of life," but few seemed to agree on what quality of life included. In some areas it was hunting and fishing. In other places it was symphony music and opera in a relatively small city. But few places explicitly extolled the virtues of a low air pollution index or the dissolved solids or coliform bacteria counts in streams from which they draw their water supplies. What is suggested here is that potential business and industry migrants are thought to be interested only in the amount of water available for industrial purposes and not in its potable qualities. Consequently, city and state promoters may be less conscious of a demand for quality air and water by prospective clients.

It was not unexpected that the Southwestern respondents rated each of these factors higher than the other state groups. California certainly has been a national leader in seeking to improve air and water quality. Their reputation in this area should make this state attractive to environmentally-conscious clients. Many cities in the Southwest continue to suffer from heavily polluted air at times. Albuquerque, Phoenix, and several California cities regularly record high air pollution levels when temperature inversions or high pressure put an atmospheric cap on auto emissions. This is hardly the kind of thing that one would wish a potential client industry to see or experience. Yet their efforts to reduce the problems have apparently left them more confident than their peers in the South central and Southeast

states, that business and industry clients do care about a clean environment for their workers.

The Urban Ratings

This study is based on a mixed sample of state and city chamber of commerce directors. Sixty-two of the 81 respondents were from towns and cities. Cities were selected for participation 1) to provide a cross-section of cities of different size within each state, and 2) to represent a somewhat uniform geographical distribution within and between states. Just as one would expect some regional variation in the rating of importance of the 33 locational factors by the respondents, one might also expect that if we reviewed only the responses of the urban group and compared them according to city size, we might very well find that small cities and metropolitan areas will differ in their perception of the importance of locational factors in attracting business and industry.

Education

Beginning again with the group of three educational factors, we find that as a group, the cities rated secondary and higher education slightly higher than did the entire respondent group (Table 2). Any trend in ratings varying according to city size is not apparent and the small number of respondents in the two categories of over one-half million population size caution us against attempting to draw unwarranted conclusions. Of somewhat more interest are the ratings of the environmental aesthetics factors. There does seem to be a general trend for smaller cities to rate these factors as more important than larger cities. Intuitively this would seem to follow the national trend in the attraction of people out of larger urban areas to small towns and cities (Roberts and Butler 1981). The one factor in this group to have more support

among middle-sized cities rather than in small towns is recreation opportunities. Cities of 50 thousand to 1 million rated this factor as very important more frequently than either small cities or very large cities.

Labor

The response to the labor factors is rather mixed. Cities of one quarter million to one million rated factors in this group the highest although cities in the ten thousand to one quarter million range were only a few percentage points behind.

Infrastructure

Of substantially greater interest is the infrastructure group. Here again there is a tendency for the smaller-sized cities to respond favorably to such factors as low cost of living and low cost of land and building. It would not be unexpected that the costs of land acquisition, construction by non-union labor, and perhaps even the cost of electricity would be less in small towns than in large urban areas. These factors may not be clear advantages to the creation of very large industrial plants which promise several thousand jobs, such as the recent selection of Smyrna and Spring Hill, Tennessee as sites for large pickup and automobile assembly plants. Although the advantage of cheap land may appear to operate in cases such as these, real estate speculation may quickly compromise any advantage that might have attracted the initial development. Rather, it is the small to medium-sized cities that are attempting to attract smaller firms, perhaps by creating an industrial park with building sites and utility hookups, that would seem to offer the greatest attraction in low costs for land, construction, and utilities. The response to pollution control law and waste disposal regulation was mixed with no trend evident that would relate to city size.

Access

Market access should be a factor that would be rated high by respondents from the larger cities and yet the ratings were relatively high for all city size groups. Indeed, most urban respondents supply their prospective clients with copious evidence that they are part of a large and rapidly expanding market or have good access to such a market. One large city included over 50 tables in its promotional dossier that either directly or indirectly portrayed a rapidly growing local market. Transportation access and quality factors received mixed ratings with no clear trend relating to city size. One clear trend in this factor group affects access to metropolitan areas for shopping and cultural events. Large urban areas would be expected to respond most strongly to this factor and ratings declined as city size decreased.

Finance and Environmental Quality

The finance factors received mixed ratings with small to medium size cities rating these factors higher than the other city groups. A more clear-cut trend emerged in the ratings of the environmental quality factors. Here, with the exception of the largest cities, the ratings were the highest for the smallest cities and fell as city size increased. This relationship, like the low cost of infrastructure, could be expected in smaller towns just as their ratings of climatic factors tended to be higher than those of respondents from larger cities. Small cities have a reputation, deserved or not, of having cleaner air and water than larger urban areas. And small cities seem willing to capitalize on this perception in their recruiting efforts. Some small towns supply detailed water information in their promotional literature including data on the source and capacity, together with chemical analysis of hardness, alkalinity, iron, turbidity, and pH. If larger cities address this

issue in their literature, it is more likely to provide information on availability and reservoir size, rather than address the fine points of water quality.

The additional understanding provided by a review of the relationship between city size and the ratings that promoters gave to locational factors is of value. It reinforces some of our notions about the relationship of city size and certain environmental factors. But it also suggests that the more important variability in ratings still seems to lie with the regional influence pointed up in the previous section.

Perceived Position in the Sunbelt and Factor Ratings

Does the perception of one's position relative to the Sunbelt influence how one rates locational factors? To examine this question I reviewed the rating each respondent gave the locational factors according to whether or not that person had declared themselves to be located in the Sunbelt. The results were of some interest. Of the 33 factors, 23 were rated more important by the "non-Sunbelt" group (Table 3). For some ratings, the two groups were separated by only a percentage point or two. But others were rated up to 30 points apart. An example is the low cost of electricity. Seventy percent of the non-Sunbelt group (N=29), rated the factor as very important compared to only 40 percent for the Sunbelt respondents.

Secondary and higher education was rated a good deal higher by the non-Sunbelt respondents by margins of 19 and 23 percentage points respectively. Yet the Sunbelt states rated the presence of research institutions higher (by close to 2 to 1) than did the non-Sunbelt group. Today, across the Southern states there are four major clusters of advanced technology research and development that in some cases are affiliated with one or more research

universities. Several respondents specifically related present and future development to the presence of these research centers. Other cities seem aware of the advantage such research centers bring and are trying to promote themselves as the center of a "research corridor" when their only significant research institution is a federal health research laboratory.

The comparative ratings on the environmental aesthetics factors were what one would expect. The Sunbelt respondents rated climate and warm winter weather substantially higher than did the other group, although highest ratings were only 19 percent and 13 percent respectively. Recreational opportunities were rated highest in this factor group and the non-Sunbelt respondents gave the highest ratings.

In the labor factor group, the three main factors, low cost of labor, favorable labor-management relations, and skilled labor pool were all rated higher by the non-Sunbelt group by as much as 11 percentage points. While the border states may be able to make the case that they have more highly skilled workers than the Sunbelt group, it seems less likely that the labor costs are as low or that their labor relations are better than one seems to find where the level of unionization is low and the work ethic is strong. The advantage of the non-Sunbelt states is not clear on this issue. Perhaps their high rating of this factor is based more on wishful thinking than actual experience.

Access to market and five other access factors were rated higher by the non-Sunbelt group. The differential for the seven factors combined amounted to only 10 percentage points. Only on quality of roads and highways was the Sunbelt group rating higher than the non-Sunbelt respondents. The greatest disparity in ratings was in access to resources where the non-Sunbelt group

rating for this factor was 23 points higher than that of the Sunbelt. Yet, as pointed out above in a similar disparity between the border states and the other regional state groups, one is hard pressed to make a strong argument that the non-Sunbelt group is blessed with greater resource abundance than is the Sunbelt group.

The overall ratings of the environmental quality factors were about the same with the greatest differences noted on the quality of the natural environment and clean surface water. The non-Sunbelt group rated the quality of their natural environment higher by 11 percentage points. Ostensibly, the Sunbelt still enjoys an image of relatively few environmental problems and yet it is the non-Sunbelt group that seems more eager to capitalize on what ever favorable image they still enjoy. The higher scores could well have come from cities in the Ozarks, Kansas, Colorado, Utah, and Nevada where the image of clean air and water remains largely intact despite problems of metropolitan air pollution in Denver, Salt Lake City, and Las Vegas; toxic mine waste problems associated with western and eastern mining operations, and a general deterioration of air quality caused by coal-burning electrical plants.

One reason why the non-Sunbelt group responded more positively to two-thirds of the locational factors may be related as much to the booster ethic as any other reason. Certainly one would not wish to imply that those who have less to offer would purposely deceive themselves into believing that they actually had more. Instead, it may be a natural response to competitive neighbors. One will stress the importance of what one does have in response to competition from those who; 1) are relatively new to the booster-recruiting scene and are not yet aware of all the advantages that they enjoy; 2) are not aware of the techniques available through professional advertising agencies to

help them sell their merits to prospective business clients; 3) are not aware that they are capturing business from others without much effort. This idea of effort expended to stress one's advantages is the essence of boosterism (Knight 1973). This study seems to show that to date, boosterism as a technique for selling the qualities of place, has not matured in the Sunbelt in relation to the non-Sunbelt. Based on their attitudes toward the importance of key locational factors, the non-Sunbelt respondents seem to be more aggressive in their appreciation of these factors than are the Sunbelt respondents even though the conditions represented by these factors may be richer in the Sunbelt. The non-Sunbelt group seems like the outsider, looking in at the locational advantages enjoyed by the Sunbelt group. To overcome the advantage that the Sunbelt group enjoys, the others have chosen to vigorously represent what they do have in order to compete.

A second factor that may relate to this seeming disparity between non-Sunbelt and Sunbelt is that the smaller Sunbelt towns and cities are somewhat reticent to adopt the booster's concept that there is a need for growth; that for a city to become a better place to live it necessarily must become bigger (Meredith 1985). I suspect that this attitude might be more prevalent in the singular small city that is now a regional service center in the midst of a predominantly rural countryside, rather than in those cities that already find themselves in the throes of rapid development and growth. Examples of this later group include the Carolina Piedmont where small cities and rural-nonfarm development are coalescing into high population concentrations. Promotional literature from such places more closely resembles that of the larger, more aggressive cities. The smaller Sunbelt cities, on the other hand, seem to be less willing to project the image that they have everything to offer and will

accept any company that is willing to move to their town. They are perhaps more realistic about the impact that increased demands on community services, utilities, and roadways would have on their city budget and can foresee the demand for new schools and extended sewerage service outstripping the community's financial resources. They may prefer to remain a small city, to enjoy the amenities that are part of their heritage and yet acknowledge that a few new, though small, industrial plants would stabilize the labor force and keep more young people at home by providing jobs.

This assessment of the perceptual Sunbelt and advantages of place points up one last question of interest: Do these regional biases in the ratings of locational factors relate to inter-city competition for business migrants? The questionnaire that is the basis for this study requested that respondents list the three cities that they considered to be their major competition in attracting new business and industry. From central place theory, one would infer that because the number of trade and service businesses in cities is related to the size of the city and its relative position in an urban hierarchy, the primary competition for any given city should be a city of similar or larger size (Figure 1). Very large cities serve extensive hinterlands and consequently are usually far apart, perhaps in an adjoining region. A hypothetical context for city competition based on these ideas suggests that for a given region - Region B in the Figure 1 example -- the smallest cities will perceive their most important competitors to be cities of comparable size and cities somewhat larger. Unless the city in question is near a regional boundary, these competitors are likely to be nearby and part of the same region. As city size increases, the distance to perceived competition also increases so that a city of about 250,000 people may

identify other cities of comparable size in adjoining regions as competitors. They may also recognize much larger cities as competitors.

In general, this scheme is a summary of the results of the questionnaire. The chamber of commerce respondents listed their most important competitors as being of similar or larger size. With only one exception, no respondent listed a smaller-sized city as a worthy competitor. That exception is the research center city. Both Austin, Texas, and Raleigh, North Carolina, were listed as major competitors by cities that were three times as large and over a thousand miles away. Although larger city promoters apparently do not view small cities as equals in terms of attracting new business and industry, one has only to review the recent decision of two major automobile manufacturers to build new assembly plants in Spring Hill and Smyrna, Tennessee, to realize that, at least for these industries, small city size is not a handicap, and in fact may be an advantage. The implication is that cities of all sizes are effectively in competition with each other and the promotional challenge can be best equated to the game of checkers and not the game of chess.

As important as the heirarchical bias of perceived competition is the presence of a regional bias. If the South does enjoy place advantages over northern states, then one would expect that border cities would identify their major competitors as southern and not northern cities. The responses do support this idea. Of the 26 out-of-state cities listed by border state respondents as major competitors, five or 19 percent were northern cities, and three or 12 percent were in other border states. Sixty-six percent were Southeast, South central, or Southwestern cities.

Conclusion

Some of the themes that emerge from this study support the findings of previous studies, and others suggest a need for a good deal more research before the phenomenon of Sunbelt promotion and business migration is more thoroughly understood. Evidence seems to suggest that the Sunbelt is not a region in the geographic sense, nor is it perceived to be a spatial unit by promoters (Abbott 1979). The differing attitudes toward the importance of locational factors recorded across the South and Southwestern states suggests such a conclusion. One factor in the labor group, favorable labor-management relations, was collectively the highest rated of the 33 locational factors and yet the difference between the rating given by the Southeast (85 percent) and the Southwest respondents (50 percent) was 35 percentage points. An equally broad spread was noted for the factor, quality of higher education system, which 88 percent of the South central respondents rated very high as compared to 53 percent for the Southeast. Most interesting, perhaps, were the low rankings given to environmental factors associated with climate, warm winter weather, and recreational opportunities. These factors would seem to be the basis for the popular conception of the Sunbelt-Snowbelt dichotomy and yet promoters do not appear to believe that such factors play a significant role in attracting business and industry. As a group, the accessibility factors were rated the most important of those considered. Access to interstate highways and quality of roads and highways were rated very high by most respondents but some anomalies in ratings occurred, especially in the evaluation of access to resources. The Southeastern respondents rated this factor 19 percentage points higher than their peers from the Southcentral states, and yet one could argue that the Southcentral states have a greater

access to resources, especially fossil fuels. The rationale for such disparities in the ratings is not clear and requires more investigation.

The comparison of ratings given to locational factors by Sunbelt and non-Sunbelt respondents seems to suggest that aggressive promotional efforts are not yet being made in some Sunbelt communities. Whereas the non-Sunbelt states may be at a disadvantage in a number of factors -- ranging from cheap labor to availability of resources -- they nevertheless rated these factors as more important to their success in recruiting business and industry than did the so-called Sunbelt states. Perhaps the smaller cities of the Sunbelt are more selective (and honest) in portraying their assets, in the interests of attracting compatible industries.

If the distribution of natural and human resources varies widely across the Sunbelt states, so do the ratings of those resources that are perceived to be most attractive to business immigrants. Some factors that have traditionally been used to delimit the Sunbelt -- climate among them - tend to lack credible support as attractions. Instead, access to markets, highways, skilled labor, and favorable labor-management relations were the factors promoters would wish to be able to publicize on behalf of their constituents.

Note

1. There is an initial difficulty in inferring that the response of one person in one city could represent the views of other cities in a state or adjacent states. All cities are obviously unique with differing assets and deficiencies yet tradition of development, cultural heritage, and environmental situation may act to mitigate this problem so that we could expect that a respondent from, say, Augusta, Georgia, should have more in common with a respondent from Charleston, South Carolina, than with someone from San Jose or Yuma.

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Table 1

Locational Factors As Rated By Chambers Of Commerce

Factors Considered Very Important in Location of Business or Industry (On 5 point scale from unimportant through very important)	Percentage "Very Important" Regional Divisions of Respondent's States and Cities (N=81)				
	Border	Southeast	South Central	South West	Factor Average
	N=32	N=20	N=17	N=12	
A)					
Quality of Secondary Education System	.59	.70	.65	.67	.64
Quality of Higher Education System	.69	.53	.88	.67	.69
Research Institutions	.06	.20	.25	.25	.16
Education Group Average	.45	.47	.60	.53	
B)					
Climate	.09	.15	.24	.23	.16
Warm Winter Weather	.07	.11	.13	.17	.11
Natural Beauty of the Country Side	.21	.20	0	.25	.17
Distinctive Regional Lifestyle	.09	.15	.06	.25	.12
Recreational Opportunities	.22	.20	.29	.50	.27
Environmental Aesthetics Group Average	.14	.17	.14	.28	
C)					
Low Cost of Labor	.53	.40	.47	.58	.49
Favorable Labor-Management Relations	.72	.85	.65	.50	.70
Access to a Skilled Labor Pool	.69	.65	.47	.42	.59
Dynamic Population Growth	.09	.15	.06	0	.09
Labor Group Average	.51	.51	.41	.38	
D)					
Low Cost of Electricity	.73	.45	.35	.27	.51
Low Cost of Living	.19	.25	.12	.33	.21
Low Cost of Land and Building	.36	.20	.29	.33	.30
Favorable Tax Structure	.59	.55	.71	.33	.57
Community Services	.41	.16	.29	.42	.33
Pollution Control Laws	.23	.25	.13	.42	.24
Waste Disposal Regulation	.30	.40	.31	.50	.36
Infrastructure Group Average	.40	.31	.32	.37	

Locational Factors As Rated By Chambers Of Commerce (continued)

Factors Considered Very Important in Location of Business or Industry (On 5 point scale from unimportant through very important)	Percentage "Very Important" Regional Divisions of Respondent's States and Cities (N=81)				Factor Average
	Border N=32	Southeast N=20	South Central N=17	South West N=12	
E)					
Accessibility to Market	.78	.85	.47	.50	.69
Accessibility to Resources	.50	.60	.41	.33	.48
Low Freight Costs	.41	.45	.29	.09	.35
Access to Interstate Highways	.73	.70	.56	.75	.69
Quality of Roads and Highways	.53	.65	.44	.83	.59
Quality of Rail Service	.35	.10	.38	.33	.29
Access to Metropolitan Areas for Shopping and Cultural Events	.47	.40	.25	.50	.41
Access Group Average	.54	.53	.40	.48	
F)					
Available Financing through Revenue or General funds	.41	.30	.29	.25	.33
Availability of Venture Capital	.22	.15	.24	.08	.19
Finance Group Average	.31	.23	.26	.17	
G)					
Quality of the Natural Environment (Clean air and water, for example)	.31	.25	.24	.33	.28
Clean Air	.17	.20	.25	.33	.22
Clean Surface Water	.17	.35	.31	.42	.28
Clean Ground Water	.27	.40	.38	.42	.35
Assured Future Fresh Water Availability	.50	.50	.44	.75	.53
Environmental Quality Group Average	.28	.34	.42	.45	

Table 2

Locational Factors As Rated By Urban Chambers of Commerce

Factors Considered Very Important in Location of Business or Industry (on 5 point Scale from Unimportant Through Very Important)

	Percentage "Very Important" City Size						Factor Average
	2500- 9999	10000- 49999	50000- 249000	250000- 499999	500000- 999999	1 Million and Over	
	N=3	N=26	N=19	N=9	N=3	N=2	
A)							
Quality of Secondary Educational System	.67	.64	.63	.78	.67	1.00	.67
Quality of Higher Educational System	.67	.72	.67	.67	1.00	1.00	.72
Research Institutions	0	.12	.11	.33	0	.50	.15
Education Group Average	.44	.49	.47	.59	.55	.83	
B)							
Climate	.33	.8	.21	0	.33	0	.13
Warm Winter Weather	.33	.9	.11	.11	0	0	.10
Natural Beauty of the Countryside	.33	.21	.18	.11	.33	0	.19
Distinctive Regional Lifestyle	.33	.08	.11	.11	0	0	.10
Recreational Opportunities	0	.20	.37	.44	.33	0	.28
Environmental Quality Group Average	.27	.13	.20	.16	.20	0	
C)							
Low Cost of Labor	0	.56	.53	.44	0	0	.46
Favorable Labor Management Relations	.67	.76	.68	.89	.67	0	.72
Access to a Skilled Labor Pool	.33	.56	.63	.56	1.00	.50	.59
Dynamic Population Growth	0	.04	0	.11	.33	0	.05
Labor Group Average	.25	.48	.46	.50	.50	.13	

Locational Factors As Rated By Urban Chambers of Commerce (continued)

Factors Considered Very Important in Location of Business or Industry (on 5 point Scale from Unimportant Through Very Important)

Percentage "Very Important"
City Size

	2500- 9999	10000- 49999	50000- 249000	250000- 499999	500000- 999999	1 Million and Over	
	N=3	N=26	N=19	N=9	N=3	N=2	Factor Average
D)							
Low Cost of Electricity	.67	.74	.37	.44	0	0	.51
Low Cost of Living	0	.16	.16	.22	.33	0	.16
Low Cost of Land and Building	.33	.32	.21	.22	0	0	.25
Favorable Tax Structure	.67	.60	.47	.56	0	1.00	.54
Community Services	.33	.46	.32	0	.33	0	.32
Pollution Control Laws	.33	.17	.33	.11	.33	.50	.24
Waste Disposal Regulation	.67	.46	.33	.22	.67	.50	.41
Infrastructure Group Average	.43	.41	.29	.25	.24	.29	
E)							
Accessibility to Market	.67	.80	.58	.67	1.00	.50	.71
Accessibility to Resources	1.00	.60	.42	.44	0	0	.49
Low Freight Costs	.67	.33	.26	.44	.33	0	.33
Access to Interstate Highways	.67	.75	.78	.56	1.00	1.00	.75
Quality of Roads and Highways	.67	.67	.67	.44	.67	.50	.63
Quality of Rail Service	0	.48	.17	.22	.33	0	.29
Access to Metropolitan Areas For Shopping and Cultural Events	.33	.42	.44	.22	.67	1.00	.42
Access Group Average	.57	.58	.47	.43	.57	.43	
F)							
Available Financing Through Revenue or General Bonds	0	.48	.32	.22	0	0	.33
Availability of Venture Capital	.33	.28	.21	.11	.33	0	.23
Finance Group Average	.17	.38	.26	.17	.17	0	

Locational Factors As Rated By Urban Chambers of Commerce (continued)

Factors Considered Very Important in Location of Business or Industry (on 5 point Scale from Unimportant Through Very Important)

Percentage "Very Important"
City Size

	2500- 9999	10000- 49999	50000- 249000	250000- 499999	500000- 999999	1 Million and Over	
	N=3	N=26	N=19	N=9	N=3	N=2	Factor Average
G)							
Quality of the Natural Environment (clean air, water)	.33	.32	.26	.11	0	.50	.26
Clean Air	.33	.25	.28	.11	0	.50	.24
Clean Surface Water	.33	.38	.28	.11	.33	.50	.31
Clean Ground Water	.33	.50	.33	.22	.33	.50	.39
Assured Future Fresh Water Availability	.67	.58	.50	.56	.50	.50	.56
Environmental Quality Group Average	.40	.40	.33	.22	.27	.50	

Table 3

Locational Factors As Rated By Chambers of Commerce
Comparison of Chambers Inside and Outside of the Sunbelt
(City and State Combined)

Factors Considered Very Important (On a 5 Point Scale of Unimportant through Very Important) In the Attraction of Business and Industry	Percentage of Respondents Who Ranked Variable as "Very Important"		
	In-Sunbelt	Not-In-Sunbelt	Factor Average
	N=51	N=29	
A)			
Quality of Secondary Educational System	.57	.76	.64
Quality of Higher Education System	.60	.83	.68
Research Institutions	.18	.11	.15*
Education Group Average	.40	.57	
B)			
Climate	.19	.07	.15
Warm Winter Weather	.13	.04	.09*
Natural Beauty of the Countryside	.14	.22	.17
Distinctive Regional Lifestyle	.12	.10	.11
Recreational Opportunities	.26	.28	.26
Environmental Aesthetics Group Average	.17	.14	
C)			
Low Cost of Labor	.47	.52	.49
Favorable Labor-Management Relations	.67	.76	.70
Access to a Skilled Labor Pool	.55	.66	.59
Dynamic Population Growth	.10	.7	.09*
Labor Group Average	.45	.50	
D)			
Low Cost of Electricity	.40	.70	.51
Low Cost of Living	.18	.24	.20
Low Cost of Land and Building	.22	.41	.29
Favorable Tax Structure	.55	.59	.56
Community Services	.28	.38	.32
Pollution Control Laws	.26	.19	.23*
Waste Disposal Regulation	.36	.33	.35*
Infrastructure Group Average	.32	.41	

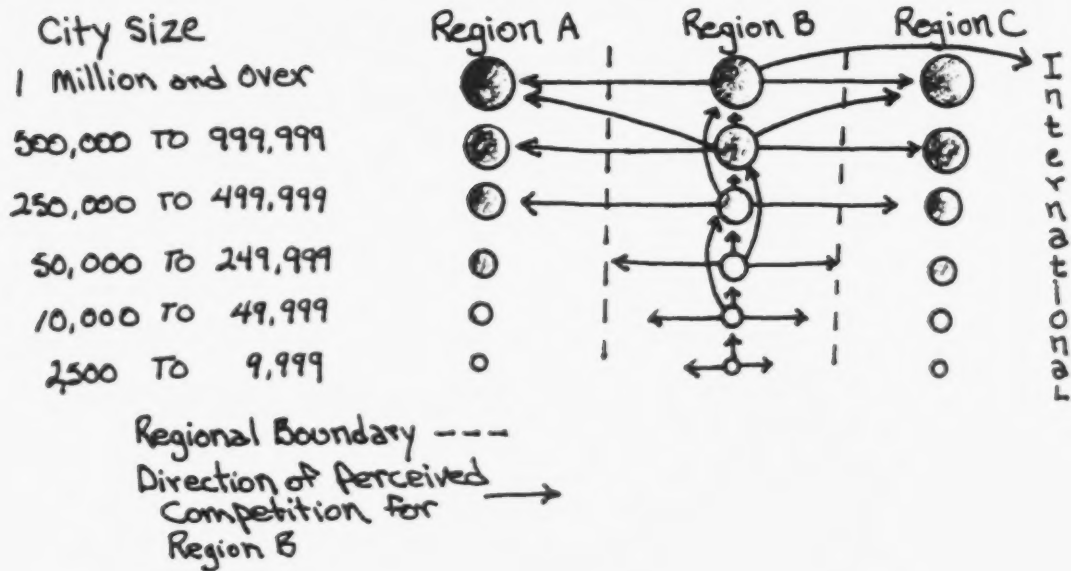
Locational Factors As Rated By Chambers of Commerce
Comparison of Chambers Inside and Outside of the Sunbelt
(City and State Combined) (continued)

Factors Considered Very Important (On a 5 Point Scale of Unimportant through Very Important) In the Attraction of Business and Industry	Percentage of Respondents Who Ranked Variable as "Very Important"		
	In-Sunbelt	Not-In-Sunbelt	Factor Average
	N=51	N=29	
E)			
Accessibility to Market	.61	.83	.69
Accessibility to Resources	.39	.62	.48
Low Freight Costs	.29	.43	.34
Access to Interstate Highways	.68	.70	.69
Quality of Roads and Highways	.62	.52	.58*
Quality of Rail Service	.24	.35	.28
Access to Metropolitan Areas For Shopping and cultural Events	.40	.44	.42
Access Group Average	.46	.56	
F)			
Available Financing Through Revenue or General Bonds	.29	.38	.33
Availability of Venture Capital	.18	.21	.19
Finance Group Average	.24	.34	
G)			
Quality of the Natural Environment (Clean Air, Water)	.24	.35	.28
Clean Air	.22	.19	.21*
Clean Surface Water	.30	.22	.27*
Clean Ground Water	.34	.33	.34*
Assured Future Fresh Water Availability	.50	.56	.52
Environmental Quality Group Average	.32	.33	

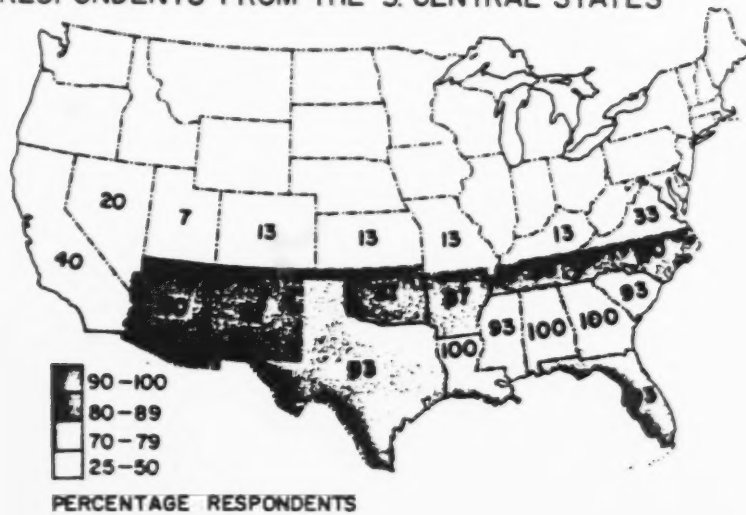
*Value For In-Sunbelt Group is higher than Not-in-Sunbelt Group 10 of 33.

FIGURE 1

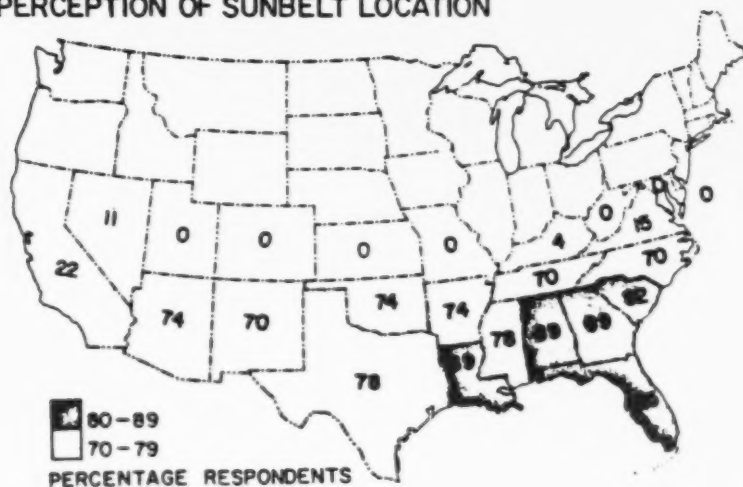
Locational Context of City Competition as Perceived by City Promoters



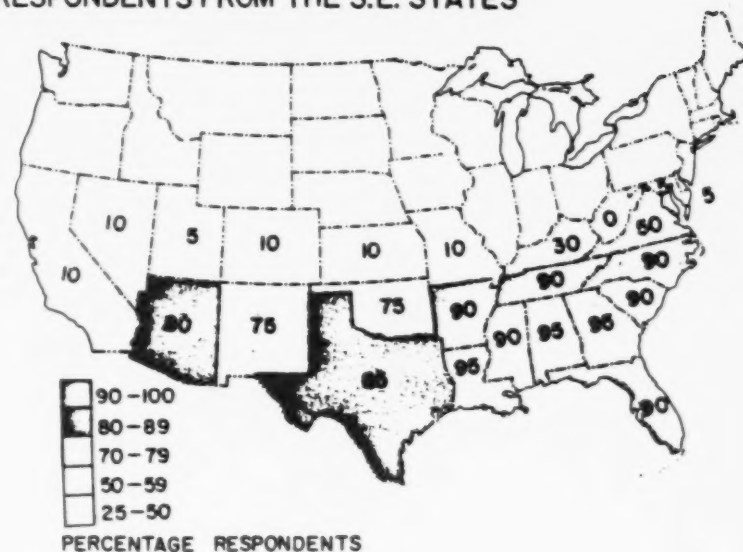
THE SUNBELT AS PERCEIVED BY
RESPONDENTS FROM THE S. CENTRAL STATES



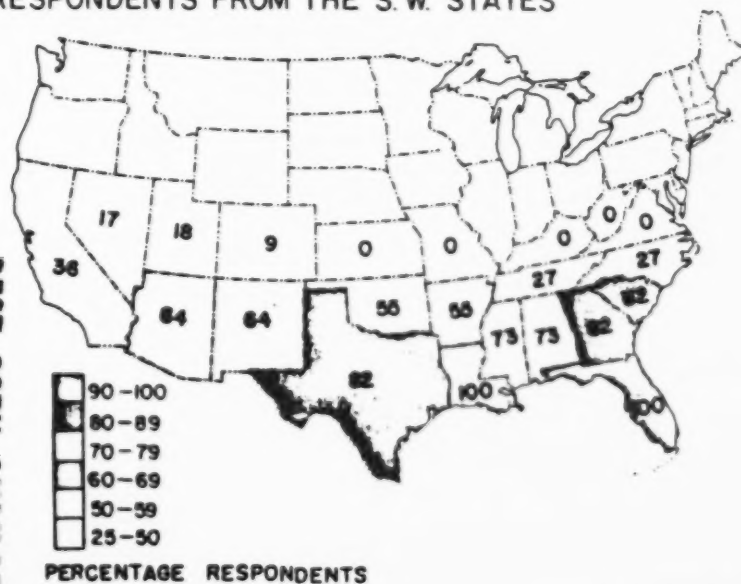
NON-SUNBELT RESPONDENT'S PERCEPTION OF SUNBELT LOCATION



THE SUNBELT AS PERCEIVED BY RESPONDENTS FROM THE S.E. STATES



THE SUNBELT AS PERCEIVED BY RESPONDENTS FROM THE S.W. STATES



THE SUNBELT AS PERCEIVED BY RESPONDENTS FROM THE BORDER STATES

